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The 1- Minute Brief

Silicon Labs Q3’26 Earnings

Announced on 10, Nov’26

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Key Takeaways

- Q3’26 revenue was $251M, up 22% YoY and 10% QoQ, driven by broad-based demand and a record medical revenue quarter supported by ongoing customer ramps
- Q3’26 demand remained healthy, supported by strong bookings, lean channel inventories, and continued medical customer ramps
- Gross margin was up YoY, supporting stronger profitability on higher revenue
- Medical revenue hit a record high, rising 48% QoQ and over 300% YoY, driven by continued customer ramps and growing adoption of medical connectivity solutions

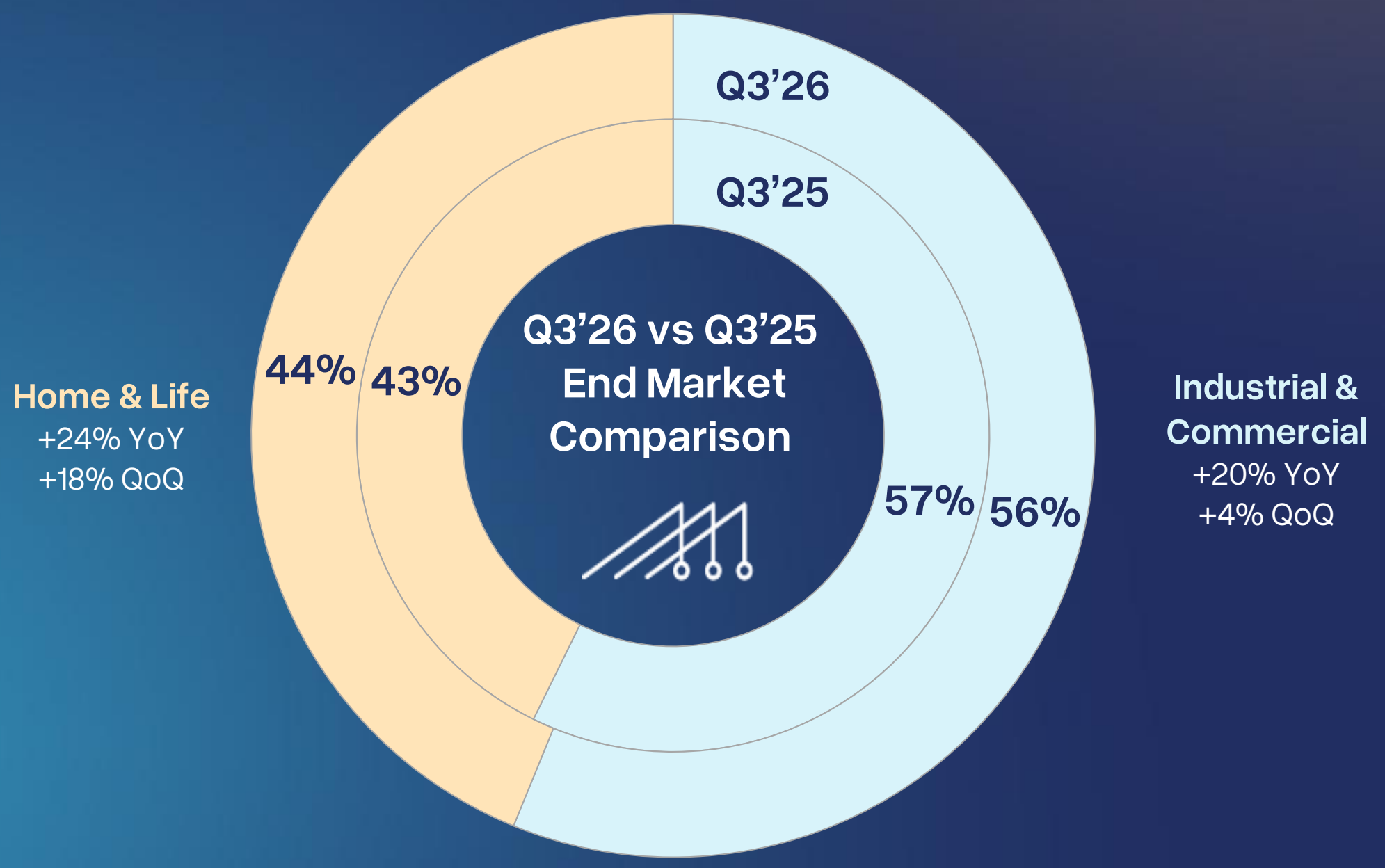
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Performance by Segment

Double-digit YoY growth noted in both business segments.

- **Industrial and Commercial**: Higher product volumes supported growth across industrial and commercial applications
- **Home & Life**: Growth was supported by higher product volumes in connected home and consumer applications, with medical applications providing a notable additional contribution



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Outlook

- Silicon Labs suspended financial guidance following the pending Texas Instruments acquisition
- It reaffirmed a positive growth outlook, supported by healthy demand, lean inventories, and a growing backlog of design wins

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